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OCTOBER 30, 1989

A Cahners publication serving the total foodservice industry

®RESTAURANTS & INSTITUTIONS

CHICKEN FLIES HIGH ON *R&I's* MENU CENSUS

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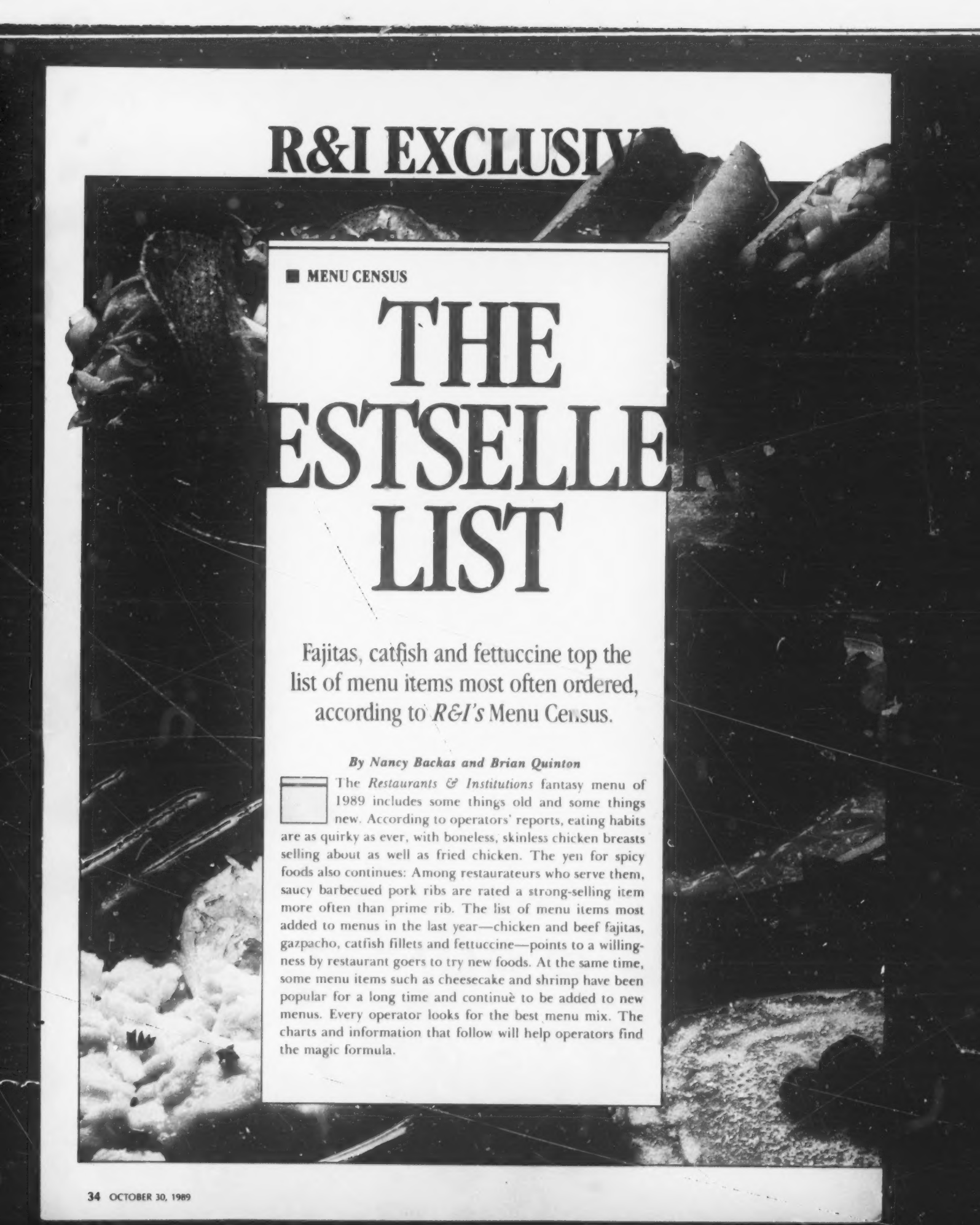
(L.) Rice takes the center of the plate, starring in Saffron Crawfish Risotto.



R&I EXCLUSIV

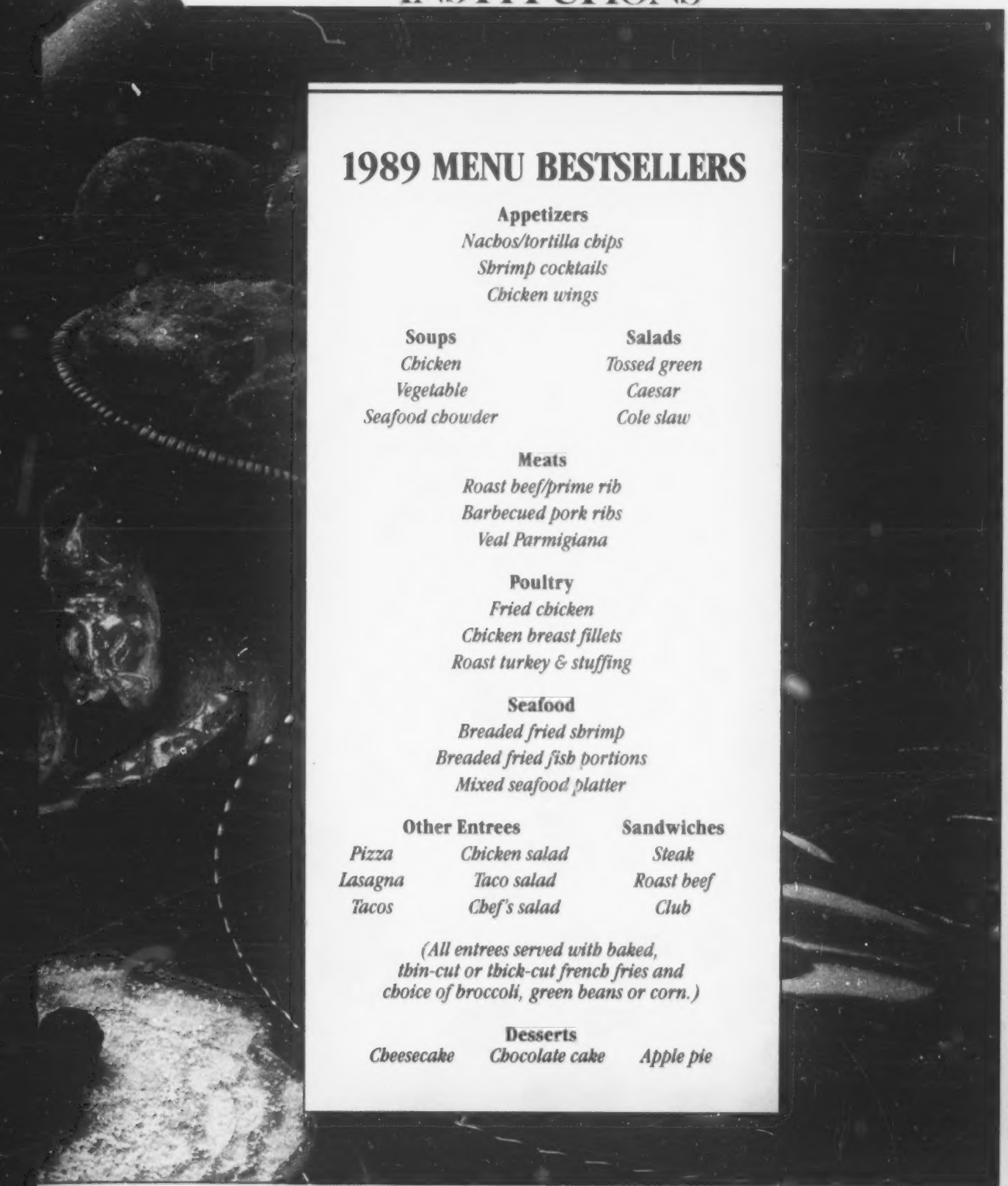
■ MENU CENSUS

THE ESTSELLE LIST

Fajitas, catfish and fettuccine top the list of menu items most often ordered, according to *R&I's* Menu Census.

By Nancy Backas and Brian Quinton

The *Restaurants & Institutions* fantasy menu of 1989 includes some things old and some things new. According to operators' reports, eating habits are as quirky as ever, with boneless, skinless chicken breasts selling about as well as fried chicken. The yen for spicy foods also continues: Among restaurateurs who serve them, saucy barbecued pork ribs are rated a strong-selling item more often than prime rib. The list of menu items most added to menus in the last year—chicken and beef fajitas, gazpacho, catfish fillets and fettuccine—points to a willingness by restaurant goers to try new foods. At the same time, some menu items such as cheesecake and shrimp have been popular for a long time and continuè to be added to new menus. Every operator looks for the best menu mix. The charts and information that follow will help operators find the magic formula.



1989 MENU BESTSELLERS

Appetizers

Nachos/tortilla chips
Shrimp cocktails
Chicken wings

Soups

Chicken
Vegetable
Seafood chowder

Salads

Tossed green
Caesar
Cole slaw

Meats

Roast beef/prime rib
Barbecued pork ribs
Veal Parmigiana

Poultry

Fried chicken
Chicken breast fillets
Roast turkey & stuffing

Seafood

Breaded fried shrimp
Breaded fried fish portions
Mixed seafood platter

Other Entrees

Pizza
Lasagna
Tacos
Chicken salad
Taco salad
Chef's salad

Sandwiches

Steak
Roast beef
Club

(All entrees served with baked, thin-cut or thick-cut french fries and choice of broccoli, green beans or corn.)

Desserts

Cheesecake
Chocolate cake
Apple pie

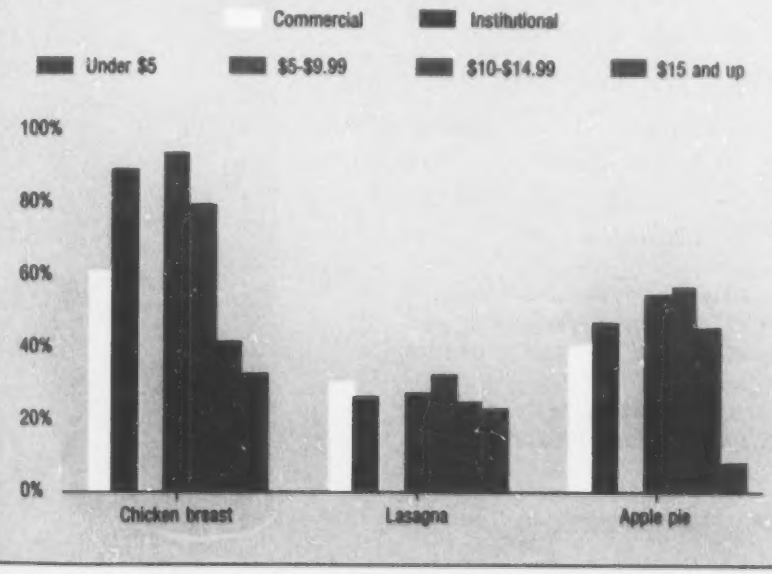
1989 MENU CENSUS

Snapshot: Takeout takes over commercial segment; workdays longer, labor costs higher in institutions.

This year's census reveals much culinary border-hopping. For example, half the operations menuing Mexican or Oriental foods sell pizza, too.

PIES, POULTRY, PASTA ON ICE

Commercial operators and those with higher dinner checks generally are less apt than the rest to buy frozen items such as those below—but often only by a little. (Chart shows percentage of category that buys frozen most often.)



This year's survey, the 18th Menu Census *R&I* has conducted, was redesigned to obtain more information about the menu specialties of responding operations. Because the questions were recast this year, direct trending with the data from previous editions of the census was not possible.

The pages that follow present the census' findings on specific menu items, how they are used, and how operators who put them on the menu think they are received.

For example, in the area of services offered, the census shows that home delivery declines drastically with larger average dinner checks: More than 80% of operations with tickets under $5 deliver, but only 7% of the $10-to-$14.99 group do so, and even fewer in the $15-and-up group. On the other hand, takeout levels remain fairly high whatever the dinner check; about 74% of all operations offer it. Interestingly, so does the level of catering. More than 52% of restaurants with average dinner checks higher than $15 cater meals away; so do 52% of those with checks less than $4.99.

The 1989 census also took note of differences in commercial and institutional foodservice. Almost half the commercial operations quizzed report they are open for breakfast. By comparison, 87% of the institutional operators who responded say they service the early crowd. And more than 70% of institutions polled say they remain open for dinner, compared to the 95% of commercial respondents who do evening business.

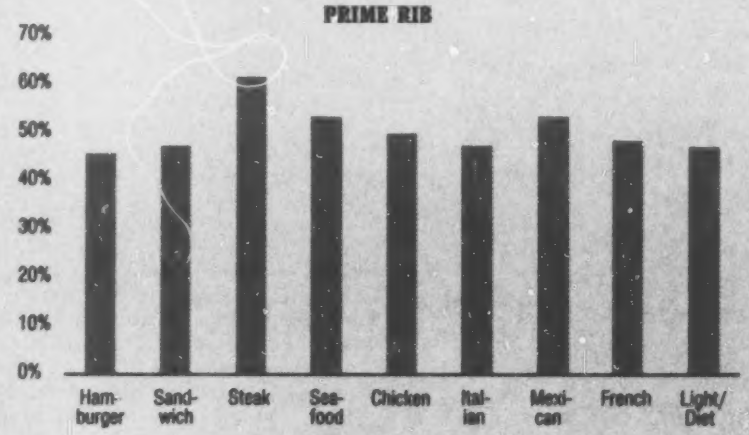
As for services offered, about 44% of institutional operators say they do takeout; 81% of commercial restaurants made that claim. And almost 10% of commercial restaurateurs from all price categories say they offer home delivery—approximately twice the percentage of institutions that made the same claim.

Finally, in both commercial and institutional sectors, the largest proportion of operators say their food costs run 31% to 40% of their foodservice revenues. But the two diverge sharply on labor costs: For the largest group of commercial operators, employees cost 21% to 30% of their F&B revenues. But the greatest portion of institutional operators—almost one-quarter—say their workers cost them 41% to 50% of foodservice revenues.

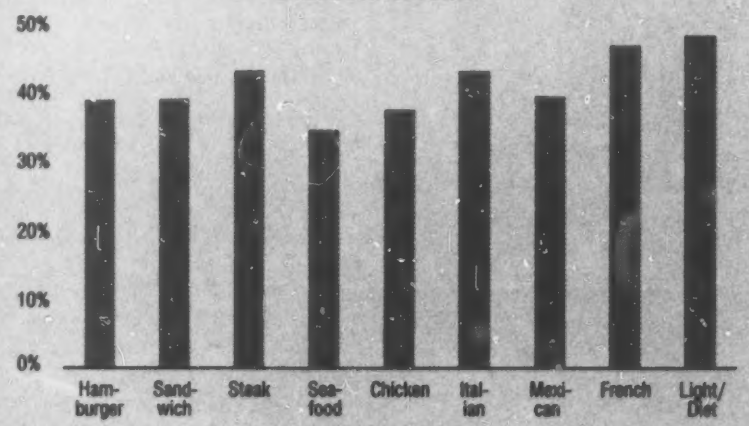
SALES ACROSS THE MENU SPECTRUM . . .

A large percentage of operations have found it profitable to break down culinary walls and expand the scope of their menus: Specialties of restaurants featuring the three items tracked below range from French dishes to sandwiches.

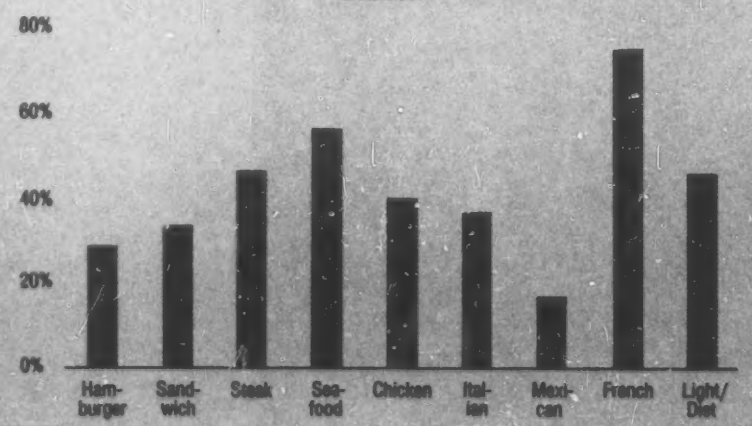
PRIME RIB



BARBECUE CHICKEN



SALMON



. . . AND AROUND THE CLOCK

The charts below give some idea of the distribution of average single-person meal checks throughout the dayparts.

Breakfast Check

Lunch Check

Dinner Check

1989 MENU CENSUS

Appetizers: The Mexican revolution ignites passion for ethnic tastes of all kinds at the table.

Spicy tastes are strong starters in the 1989 *R&I* Menu Census: Of the six items termed good sellers by the commercial operators who menu them in this year's poll, three are Mexican. Other nationalities were not overlooked in the "good seller" category either, particularly on the commercial side. Though they did not make the first six, antipasto, fried calamari, paté, brie, quiche, appetizer pizza and egg rolls are all termed strong sellers by more than half the operators who serve them.

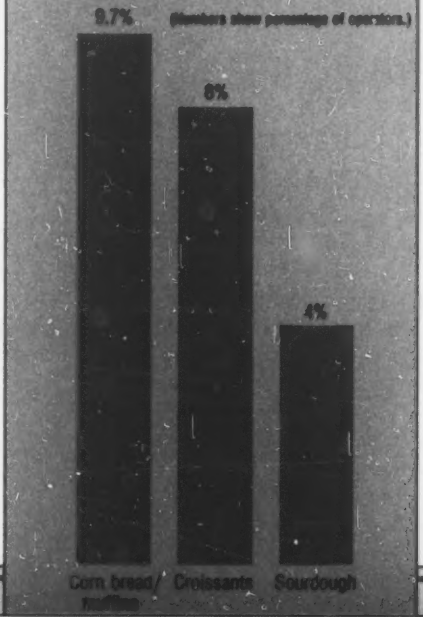
But the standards still make up a large part of the appetizer menu; more than half the operators menuing them still endorse shrimp cocktail, fruit cup, melon and cottage cheese items as selling well. In fact, shrimp cocktail is next in line for overall appetizer bestseller honors, after nachos. Restaurateurs who do business in the Northeast and South or whose average dinner checks exceed $15 are more likely to call shrimp cocktail sales strong than those in the Western or North Central regions, or in lower-ticket operations.

Institutions say the strong sellers they have on their appetizer menus are mostly the simpler dishes: Hot cheese appetizers do well, and cottage cheese items sell much better than in commercial restaurants. . . . But simpler doesn't mean uninteresting: Mushroom appetizers, egg rolls and salsa and chips all sell well in institutions, say operators who serve them. . . . Institutions also are much more apt to see chicken nuggets as an overall bestseller than their commercial counterparts. . . . Seafood nuggets, on the other hand, are a good seller but not an overall best, report the institutions that offer them.

Breads often are meal-starters too, and last year's most often added bread item was the croissant—especially in restaurants serving hamburgers, or with average dinner checks under $15. . . . Not surprisingly, dinner rolls are the bread most often served, followed by French or Italian breads, biscuits and corn bread.

BREAD FOR SUCCESS

Operators menuing bread added the following types in the last year.



APPETIZERS

Most often on menu:
Cottage cheese

Overall bestseller:
Nachos/tortilla chips

Commercial bestseller:
Shrimp cocktail

Institutional bestseller:
Nachos/tortilla chips

Most added in last year:
Shrimp (all dishes)

Most dropped in last year:
Oysters (all dishes)

Mexican finger foods figure big among commercial appetizers termed strong sellers by the operators who menu them.

Commercial
Salsa & chips
Meatballs
Clams & oysters
Nachos/tortillas
Guacamole
Hot cheese appetizers

Institutional
Hot cheese appetizers
Potato skins
Chicken nuggets
Cottage cheese
Meatballs
Seafood nuggets

continued on page 47

1989 MENU CENSUS

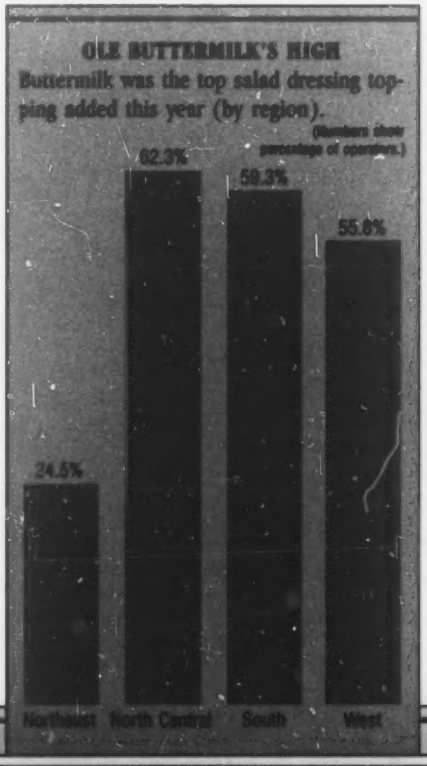
continued from page 38

Soups and salads: In the bowl or on the plate, today's vegetable-loving customers go for the greens.

The second act of a typical American meal away from home is likely to feature either chicken soup or a tossed green salad—the most widely menued items in the soup and salad categories, and the most often termed bestsellers by operators who serve them. But those bare truths obscure a few of the more interesting facts to be discovered in this part of the menu. For one thing, vegetable soups as a class nose out all types of chicken soup as the best-selling soup category, beating out all seafood, beef, cheese and other soups in the bargain. And among the vegetable-based soups, veggie itself wins No. 1-seller honors, followed by broccoli, vegetable beef and onion.

But chicken-hearted diners should take courage: Among single soup items, chicken soup is the most menued and the overall bestseller.

In the salad jungle, tossed green is the most often offered on menus. But pasta salad is the one most often called a good seller by the commercial restaurateurs who sell it.



As in the appetizer category, certain splits appear between the commercial and institutional sectors. Gelatin, Waldorf, and carrot and raisin salads are much more likely to be menued by, and to turn out to sell well for, institutional operators. . . . Caesar and avocado salads are offered more frequently by commercial restaurateurs, and ranked better as strong sellers by those who do. . . . Interestingly, operations with average dinner checks under $5 are more apt than mid- or upscale restaurants to say the avocado salads on their menu sell well.

If this is institutional dining, that will most likely be Italian dressing you're ladling on your greens. Commercial menus usually start with roquefort, then Italian, Thousand Island and buttermilk. . . . Speaking of buttermilk, it received the most votes as overall best-selling dressing among institutional operators who have it on the menu. In commercial foodservice, only individual "house" dressing beats buttermilk as an overall bestseller.

SOUPS

Most often on menu:
Chicken soup

Overall bestseller:
Chicken soup

Most added in last year:
Gazpacho (commercial)
Bean (institutional)

Most dropped in last year:
Split pea with ham

Asked to choose the soups that sell well from their menus, operators came up with a kettleful of favorite flavors.

Commercial
Seafood chowder
Potato
Bean
French onion
Minestrone
Mushroom

Institutional
Minestrone
Cream (any)
Seafood chowder
Bean
Potato
Chicken

1989 MENU CENSUS

continued from page 47

Meat entrees: Regional favorites become good sellers away from home base.

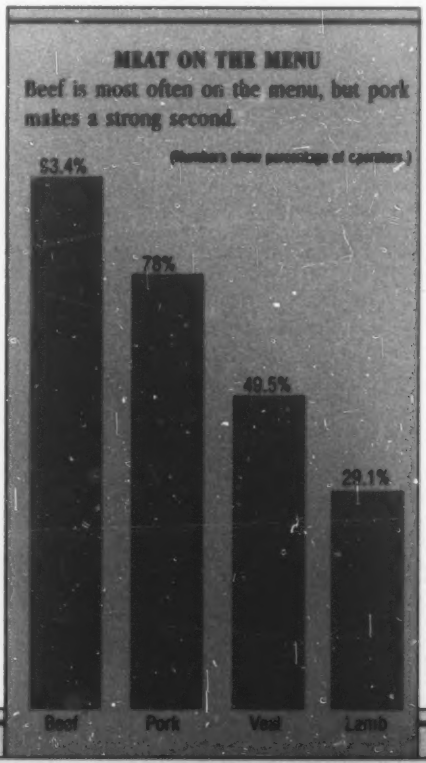
Beef dominates the meat entrees on menus, as it has for many years. The difference is that while items such as steak and prime rib appear on more commercial menus than any other meat entrees, it is more unusual items such as chicken-fried steak, beef tenderloin and barbecue beef that are most often top sellers when menued.

Chicken-fried steak, for example, is an entree that was invented in Oklahoma and for years known only to a small United States region. It is now known nationwide and was cited in this year's Menu Census as a strong-selling meat entree in commercial operations. . . . While old standbys such as beef tenderloin and barbecue beef still sell well, so do lamb chops and pork chops, two items that used to be overshadowed by beef entrees such as prime rib.

Institutional operations claim such regional favorites as chili con carne and beef fajitas sell better when on the menu than more standard prime rib and barbecue pork rib entrees. . . . Institutional operators serve meatloaf as often as baked ham, but meatloaf sells better when menued. . . . Beef fajitas, a menu item known only to those living in the Southwest five years ago, has quickly become a favorite all over.

Pork chops and pork barbecue ribs are most often served at restaurants with check averages less than $5 and at restaurants with check averages between $10 and $15. . . . Pork chops are served throughout the United States, but pork roast is served most often in the Northeastern and North Central regions. . . . Veal parmigiana appears on more menus in the Northeast than in any other U.S. region.

Institutions are twice as likely as commercial operations to have liver, meat balls and meatloaf on the menu. . . . Baked ham is the pork entree most often on both institutional and commercial menus, but is on twice as many institutional as commercial menus. . . . After potatoes, broccoli is the vegetable served most often with beef in commercial operations, while string beans top the list in institutions.



MEAT ENTREES

Most often on menu:
Baked ham

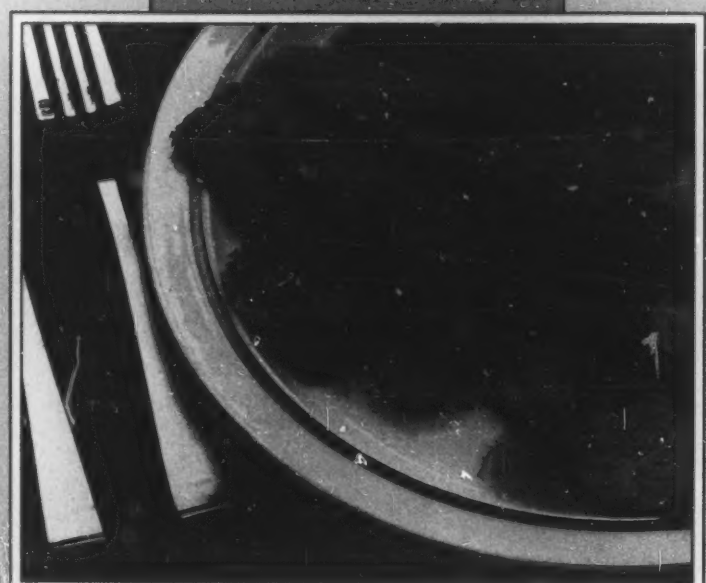
Overall bestseller:
Roast beef/prime rib

Commercial bestseller:
Roast beef/prime rib

Institutional bestseller:
Veal parmigiana

Most added in last year:
Beef fajitas

Most dropped in last year:
New York strip steak



For operators who feature it, beef is back. Five of their six strongest-selling meat entrees involve beef.

Commercial
Chicken-fried steak
Beef tenderloin
Barbecued beef
Chili con carne
Meatloaf
Barbecued pork ribs

Institutional
Barbecued beef
Chili con carne
Beef fajitas
Prime rib
Barbecued pork ribs
Chicken-fried steak

1989 MENU CENSUS

Poultry entrees: Chicken breast fillet is star attraction and on more menus than any other entree.

Fried chicken is still one of the best-selling poultry entrees, but boneless, skinless chicken breast fillets are gaining favor, thanks to a poultry industry that developed the product for easy preparation. Other lower-fat preparations also are moving up on the good-seller list as operators discover patrons' desire for more nonfried items.

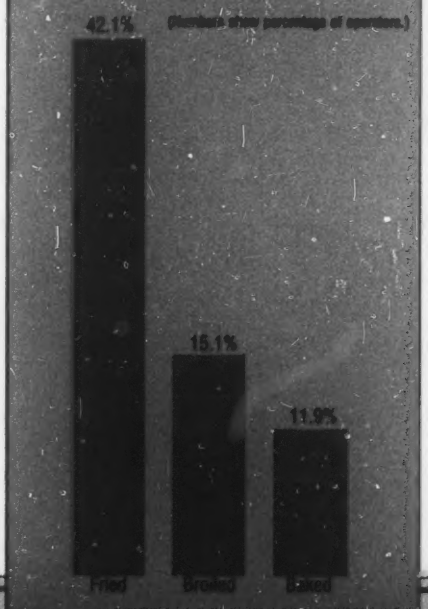
The chicken breast fillet is served in operations with check averages in the $2.50 to $5 range at lunch and $5 to $10 range at dinner. . . . While chicken breast fillet sells well in the Northeast, North Central and Southern regions, it does not sell as well in the West. . . . Perhaps because of the abundance of beef in the West, chicken entrees sell least well overall there. . . . Southwestern-inspired chicken fajitas makes the good-seller list in institutions; it also is the item most added last year in institutions. . . . Fried chicken was both the item most dropped last year and the overall best-seller when menued, an indication of "dietary schizophrenia." . . . The marketing of turkey parts such as turkey breast has helped move turkey breast up the ladder as an overall good seller, ranking No. 3 in the institutional good seller when menued.

While broccoli is the top vegetable, other than potato, served with poultry, at least three-and-a-half times as many respondents serve poultry with white rice and three times as many serve it with potatoes. . . . Institutions most often serve broccoli and green beans with poultry; commercial operations choose broccoli and mixed vegetables. . . . Poultry dishes most often are accompanied by mashed potatoes.

Specially formed chicken products such as chicken tenders, chicken nuggets and chicken patties are designated good sellers by more than half of survey respondents who menu them. . . . While few have duck on the menu, those who do serve duck find it sells well. . . . Chicken pot pies and chicken fajitas sell best in the South while chicken and noodles sells better in the North Central region.

BIRD WATCHING

Among operators who feature these styles, fried chicken is termed overall bestseller.



POULTRY ENTREES

Most often on menu:
Chicken breast fillets

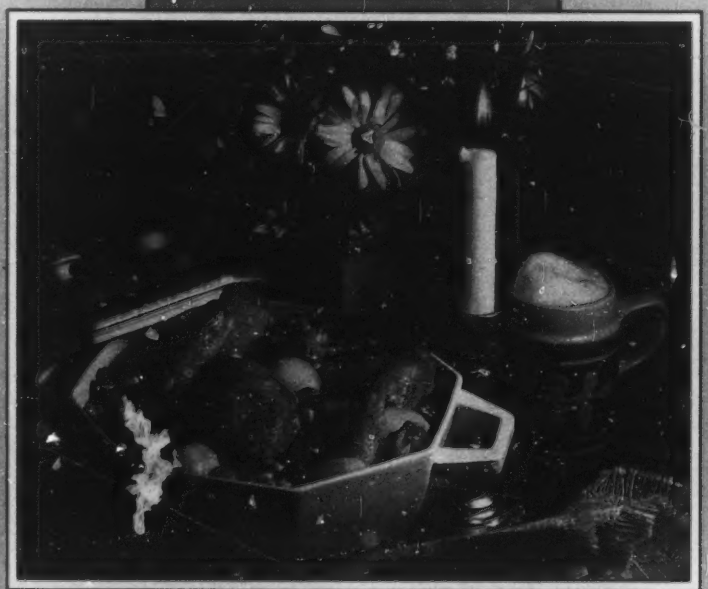
Overall bestseller:
Fried chicken

Commercial bestseller:
Chicken breast fillets

Institutional bestseller:
Fried chicken

Most added in last year:
Chicken breast fillets (commercial)
Chicken fajitas (institutional)

Most dropped in last year:
Fried chicken



Commercial and institutional operators who put poultry on the menu report almost the same list of strong-selling items.

Commercial
Barbecued chicken
Baked chicken
Chicken breast fillets
Fried chicken
Hot turkey sandwich
Broiled chicken

Institutional
Baked chicken
Chicken breast fillets
Turkey breast
Chicken patties
Hot turkey sandwich
Chicken fajitas

continued on page 58

1989 MENU CENSUS

continued from page 54

Fish and seafood entrees: Popularity of catfish points to strength of fish farming.

Broiled, grilled and sautéed fish and seafood entrees are rivaling fried fish as good-selling entrees when menued, although fried items still come out on top. The fish most likely to succeed, according to this year's census, is the catfish fillet, a testament to the growing popularity of farmed fish. But shrimp, scallops and cod continue to show up on the menu more than any other fish or seafood items.

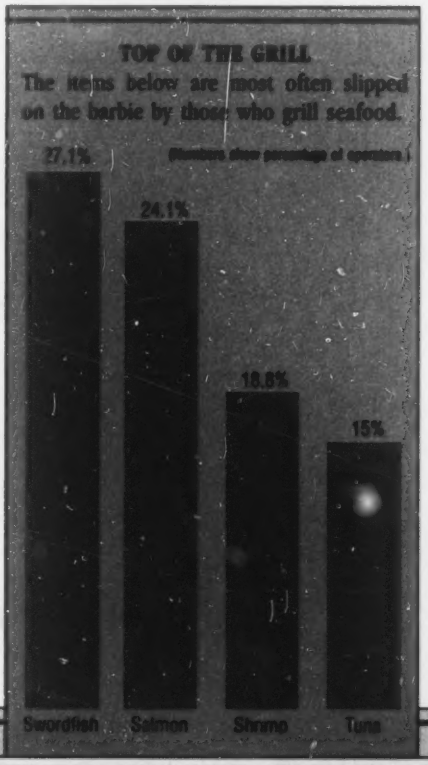
Broiled shrimp is moving up on breaded fried shrimp as a good-selling entree. . . . Broiled shrimp sells best in the South and West while breaded fried shrimp sells well everywhere.

Tuna casserole is named as a good seller twice as often in institutional operations as in commercial operations and is menued least often in the South. . . . Baked salmon sells best in the South and Northeast, least in the North Central region.

In commercial operations, scallops figure as a good bet on menus. Both sautéed scallops and breaded and fried scallops are called good sellers when menued by more than two-thirds of respondents. . . . Operators in the Northeast and South who serve breaded and fried scallops are most likely to call them strong sellers, while those in the West and South make the same claim for sautéed scallops.

Salmon was the fish most dropped from the menu in 1989, perhaps resulting from the Alaska oil scare, but when it was menued, it sold well. . . . The best-selling salmon preparation is grilled, followed by poached, baked and finally broiled. . . . Overall, the majority of operators surveyed say they buy salmon fresh. Those in the North Central region are most likely to buy frozen and canned salmon, those in the West least likely.

Breaded and fried fish portions are on the menu as often in commercial operations as in institutions, but institutions more often claim they sell well. . . . More unusual vegetables such as zucchini, asparagus and squash are served more often with seafood in commercial operations than in institutions.



SEAFOOD ENTREES

Most often on menu:
Breaded fried shrimp

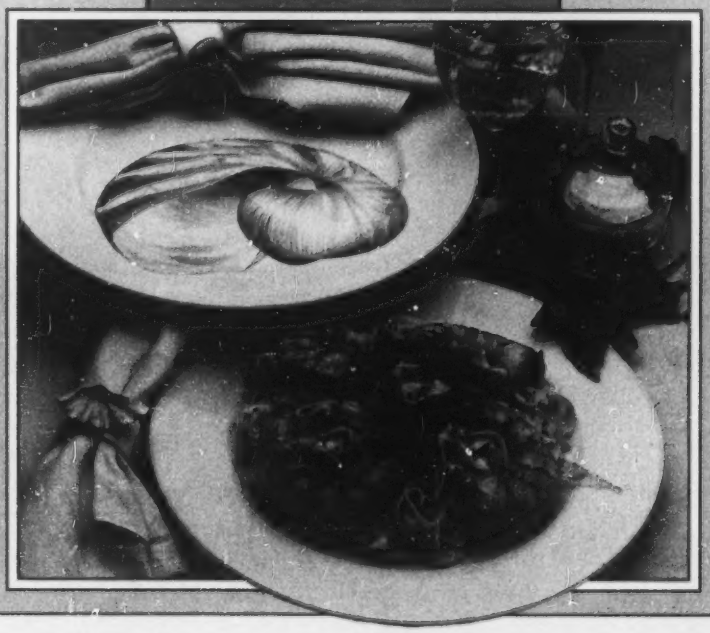
Overall bestseller:
Breaded fried shrimp

Commercial bestseller:
Grilled swordfish

Institutional bestseller:
Breaded fried shrimp

Most added in last year:
Catfish fillets

Most dropped in last year:
Salmon (all dishes)



Broiling and frying are the most common prep techniques on this list of strongest-selling seafood.

Commercial
Breaded fried shrimp
Sautéed scallops
Broiled shrimp
Breaded fried scallops
Catfish fillets
Broiled halibut

Institutional
Fried clams
Broiled cod/scrod
Breaded fried shrimp
Catfish fillets
Breaded fried fish portions
Tuna casserole

1989 MENU CENSUS

Other entrees: Ethnic offerings begin to enter mainstream, edging out old standbys.

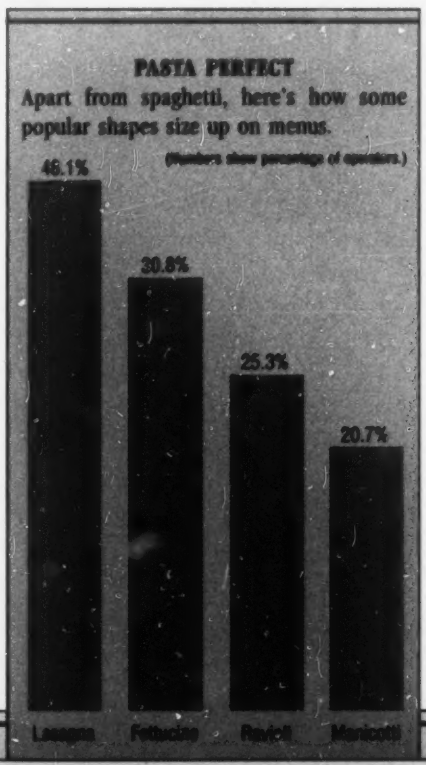
Old menu standbys such as chef's salad, chicken salad and stuffed tomato continue to be good sellers, but ethnic entrees are beginning to encroach on their territory. Italian pasta entrees show their strength as patrons discover they are not so fattening after all. And the spicing up of America's palate makes Mexican entrees more appealing all the time.

Of the top 10 ethnic entrees menued, six are Italian, three are Mexican and one is Asian. Lasagna is on the menu most often, followed by pasta with sauce, pizza and tacos. The one Asian-type entree in the top 10 is chop suey. . . . Although fewer than one-fourth of repondents had quesadillas, chilies rellenos or tostadas on the menu, they appear as good sellers for a majority of those who do serve them.

Pizza comes out a winner as the entree named to the overall-bestseller list and as the bestseller in institutions. . . . Pizza sells better in commercial operations than in institutions. . . . The majority of commercial operations make pizza from scratch, while institutions most often serve frozen pizza.

Those who menu the ever-popular chef's salad claim it is a good-selling entree salad, equally a good seller in every United States region. The check average in operations where chef's salad is sold ranges from $2.50 to $7.50 at lunch; from less than $5 to $10 at dinner. . . . Chicken salad is the entree salad that appears on most menus. The North Central and Southern regions are most likely to serve chicken salad. . . .Taco salad sells best in the North Central region.

One of the newest ethnic entrees to hit menus with great frequency is fajitas, an ethnic entree that sells well all over the United States, in both commercial and institutional operations. . . . Stuffed shells, another ethnic entree gaining favor, is on the menu three times as much in the Northeast than in any other region. . . . Fettuccine, ranking third in the commercial good-seller list, is served most often in the South.



OTHER ENTREES

Most often on menu:
Chicken salad

Overall bestseller:
Pizza

Commercial bestseller:
Chicken salad

Institutional bestseller:
Pizza

Most added in last year:
Fettuccine

Most dropped in last year:
Pasta (all types)

Strong-selling alternate entrees are a mix of classic diet dishes such as stuffed tomatoes and flavorful ethnic options.

Commercial
Tacos
Chef salad
Fettuccine
Chicken salad
Fruit salad
Pasta with sauce

Institutional
Stuffed tomato
Stuffed shells
Pasta with meatballs
Taco salad
Chef salad
Fruit salad

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Side dishes: Bakes take honors for best sales performance by a supporting tuber.

Clearly, potatoes are still the a-la-carte side dish of choice. But if the sells-well list at the foot of the page were enlarged a few slots, other vegetables would make a respectable showing as strong sellers wherever they are on the menu. Mushrooms, carrots, green beans and peas round out the top 10 commercial side dishes; while institutional outlets favor broccoli, mushrooms, stir-fried vegetables and kernel corn, in that order.

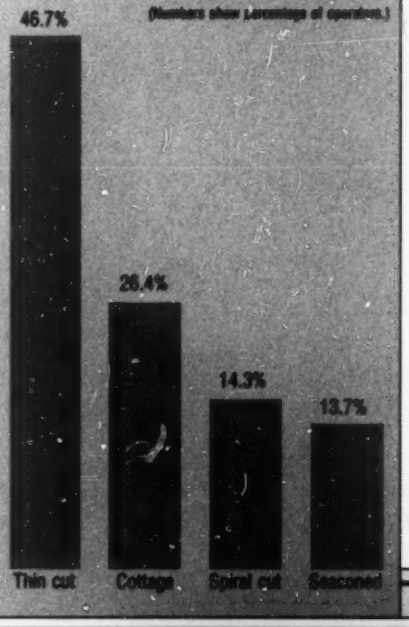
When grouped together, the various styles of french fries (thick- and thin-cut, spiral, curls, etc.) get the most votes as a menu best seller. But more operators on both the commercial and institutional fronts say that baked potatoes sell better than any single style of french fry.

On the non-potato vegetable side, broccoli is the vegetable most often termed an overall bestseller by operators who feature it, particularly where light or diet dishes are on the menu. After broccoli comes onion rings—so much for light or diet. . . . As for how restaurants buy their vegetables, that depends in part on their average dinner check: Outlets with tickets under $5 are almost 25 times more likely to buy frozen broccoli than those where the average dinner check exceeds $15. . . . For some reason, spinach is menued least often in the West.

When beef is center of the plate, commercial operations most commonly serve baked potatoes and/or broccoli on the side. Institutional diners are more apt to order mashed potatoes and gravy with their red meat, and green or string beans as another vegetable. . . . With pork, both segments are more likely to serve white rice than potatoes; for a vegetable with pork, it's loose corn in institutions and carrots for commercial operators. . . . Sauerkraut is 13th on the list of likely pork accompaniments in commercial restaurants—two places below applesauce. . . . Oriental vegetables are available across the dinner-check range: One-third of all restaurants polled offer some kind of stir-fried vegetable dish.

FRENCH ACCENTS

These days, a good portion of operators serving fries are trying a different cut.



SIDE DISHES

Overall bestseller:
French fries (all styles)

Commercial bestseller:
Baked potato

Institutional bestseller:
Thin-cut french fries

Most added in last year:
Onion rings

Most dropped in last year:
Mashed potatoes

The potato is the pre-eminent side dish, particularly in institutions. But the next six strong sellers are almost all vegetables.

Commercial
Mixed vegetables
Cottage fries
Au gratin potatoes
Zucchini/squash
Onion rings
Baked potato

Institutional
Stuffed potatoes
Spiral fries
Potato pancakes
Au gratin potatoes
Scalloped potatoes
Cottage fries

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1989 MENU CENSUS

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Desserts: Old-fashioned endings prevail, but the ice-cream-and-cake crowd makes room for regional items.

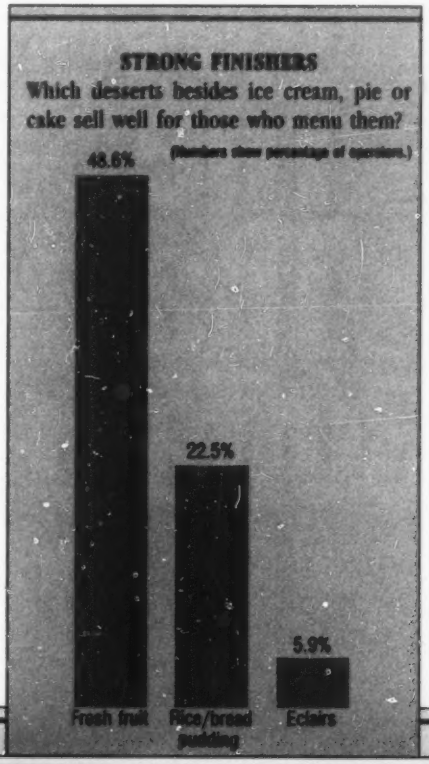
No surprise endings here: Ice cream, apple pie and cheesecake top the list of desserts most often menued. In fact, they are among the top 30 strong-selling menu items of any kind, across the menu. Ice cream leads in terms of items offered, of course; two-thirds of operators polled report ice cream on their menus. But the segment breakouts show that cheesecake is menued as frequently as ice cream in commercial restaurants.

Cheesecake, any cheesecake, is most often cited as an overall best-selling dessert item by those who feature it. It was added to menus more often than almost any other dessert item last year, particularly in commercial restaurants where the average dinner check exceeds $10. That makes sense: Units with that average ticket and cheesecake on the menu are the most likely to say it sells well.

Pies menued seem to differentiate by dinner check: Almost every variety is far more likely to show up on the menu of a low-ticket outlet. Apple pie, by far the most popular variety, is on the menu of fewer than half the restaurants with $15-plus check averages.

Beyond the Big Three of the dessert cart, Northeastern outlets most often put fresh fruit on the dessert menu; operators in the North Central region favor any berry pie; and both South and West usually feature chocolate cake.

Down at the other end of the list, the less common desserts show some interesting patterns. Bread pudding is on the menu at more than half of the institutional outlets polled and at almost half the restaurants with a dinner check of less than $5. . . . Almost two-thirds of the North Central restaurants offering any cobblers report they sell well, compared to about 40% for the same group elsewhere. . . . Almost equal proportions of restaurants serving éclairs say they buy them fresh, purchase frozen or make them from scratch. . . . Most commonly added desserts in the last year: Cheesecake, apple pie and frozen yogurt.



DESSERTS

Most often on menu:
Ice cream
Apple pie
Cheesecake

Overall bestseller:
Cheesecake

Commercial bestseller:
Cheesecake

Institutional bestseller:
Chocolate cake

Most added in last year:
Carrot cake (commercial)
Cheesecake (institutional)

Among operators who feature it on the menu, pie takes the cake as a strong-selling dessert—if only for its sheer variety.

Commercial
Ice cream
Cheesecake
Chocolate cream pie
Pecan pie
Apple pie
Berry pie

Institutional
Cupcakes
Chocolate cream pie
Frozen yogurt
Fresh fruit
Berry pie
Lemon pie

ACTION EXPRESS

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